



PATENT
Customer No. 39,878
Attorney Docket No. 0005.0005

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re Application of : Patrick J. COYNE Confirmation No.: 9305
Application Number : 10/661,612
Filed : September 15, 2003
Title : PROJECT MANAGEMENT SYSTEM, METHOD, AND
NETWORK, EMPLOYING ODBC-COMPLIANT DATABASE
AND SQL AND COLD FUSION SERVERS
TC/Art Unit : 2168
Examiner: : PARDO, Thuy N.
Docket No. : 0005.0005
Customer No. : **39878**

DECLARATION UNDER 37 C.F.R. §1.131

I, Patrick J. Coyne, state that I am the named applicant of the above-identified application and the inventor of the subject matter described and claimed therein.

1. I am the sole inventor of the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, as reflected in the Amendment and Response filed with this Declaration.

2. In my prior Declaration dated June 24, 2008 that I submitted in this matter, I stated that I conceived of at least the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, in the United States, at least as early as November 3, 1999. Since submitting my June 24, 2008 Declaration, I have identified additional records that I am enclosing with this Declaration that corroborate that the present invention was conceived at least as early as July 28, 1998.

3. Prior to April 1998, I conceived of and was working on developing an application of the invention described in this application. I initially worked in Lotus Agenda, prior to April 1998. The Lotus Agenda software, however, had certain limitations regarding data that was maintained in inconsistent formats. I am not a programmer or a specialist in computer software. I provided the concept and direction to others who assisted me in writing an application, at my direction, embodying my concept for the invention.

4. My original concept, which I possessed prior to April 1998, involved merging data from various software applications that I used in my law practice, many of which maintained data in incompatible formats, into a single professional services practice application from which I could view the data from various, otherwise incompatible, sources.

5. I envisioned doing this through the use of one or more servers that would interface with the various software applications in order to deliver the data to the user (the attorney or other professional who is managing a matter) in a common format through a professional services practice management application, from which it could be viewed and used conveniently, without having to access multiple, potentially incompatible sources.

6. I changed law firms in January 2003, and, consequently, since that time, no longer have access to all of my records of the development work that I conducted on this invention prior to January 2003. Nonetheless, I do have certain records from this period and I am providing copies of pertinent portions of these records as exhibits to this Declaration. In accordance with 37 C.F.R. §1.131 and M.P.E.P. §715.07, I have

enclosed with this Declaration materials evidencing the conception and diligence in the reduction to practice of the present invention. Each of the copies of materials appended to this Declaration is a true and correct copy of records that I generated, or required to be generated by persons with knowledge of the facts recorded therein, at or about the time referenced with respect to the particular record. I have maintained these records in my possession, documenting some of my work on this invention.

7. Attached hereto as Exhibit A are two undated, handwritten graphs that, to the best of my recollection I made in early 1998, or earlier, of a concept of the invention, depicting tracking a patent or trademark matter. The documents attached hereto as Exhibit A are true and correct copies. The first page depicts schematically consolidating information from various sources that represents a variety of data formats (documents ("Docs"), word processing ("WP"), accounting ("Acct."), docketing ("Dock"), reports, spreadsheets ("Spreads"), and address lists ("Addr.")) and making it available through a single software application or interface (the central, vertically-elongated rectangle).

8. The second page of Exhibit A depicts one form of a proposed user interface of the invention for tracking patent or trademark matters, compiling: bibliographic information (upper left-hand corner) about a matter (from either a "Lotus Notes" database or "CPI" docketing system); time spent ("t") on the matter to-date, relative to the anticipated time that was budgeted for the matter, from the firm's time and billing records (such as a "Lotus Notes" database or other source) (shown on Exhibit A immediately below the bibliographic information area); billing-to-date information ("\$") relative to the total budgeted amount for the matter (shown on Exhibit A below the time line) from the firm's financial accounting system (typically maintained in "TMC," "Elite,"

or another, comparable, financial management software system that was in common use by law firms at that time); scanned images or icons representing pertinent documents relevant to the project (below the time and budget lines); the text of the claims or recitation of services (from a word processing document or image file of the as-filed documents); abstract; and various other, pertinent data.

9. A key feature of the concept depicted in Exhibit A is that these various data sources maintain their data in various, relatively incompatible formats, effectively precluding the data from being displayed in a common or single application or user interface.

10. Beginning in about March 1998, I moved the concept from a Lotus Agenda software application platform, in which I was working at that time and in which I personally was unable to merge the data from these various relatively incompatible sources, to a Lotus Notes platform. As I was not sufficiently skilled in programming in Lotus Notes at that time to accomplish this task myself, I retained a commercial vendor, QSMI, to assist me in the process of applying my concept in a Lotus Notes database application.

11. During the period from March 1998 through 2002, QSMI performed development work on my invention to assist me in writing an application that embodies my invention. I explained my invention to QSMI and asked QSMI to write a Lotus Notes application embodying my concept. I was in contact with software programmers at QSMI continually during the period from about March 1998 through well after December 10, 2001, through 2002, while they worked on this project.

12. During this period, I had numerous meetings and communications with QSMI about this development work. Although I do not currently have possession of the records of all of these meetings and communications, attached to this Declaration are copies of some of the communications I had with QSMI.

13. During the Spring and Summer of 1998, QSMI wrote a software application in Lotus Notes, embodying at least some of the concepts of my invention. On November 3, 1998, programmers from QSMI met with me at my office in Washington to discuss the draft that they had prepared and to secure feedback regarding the development of a Lotus Notes embodiment of my invention. Attached hereto as Exhibit B is a copy of a set of notes that I prepared for the November 3, 1998 meeting with QSMI. Exhibit B details various of the edits I was requesting to the user interface for the professional services practice management application software at that time. Exhibit B discloses various of the data formatting and interface requests I made and, in so doing, reflects some features of the structure of the database, as it existed at that time, as well as of my concept of the invention.

14. The software that is the subject of Exhibit B incorporated various elements of the concept that is disclosed and claimed in the pending application. Specifically, attached hereto as Exhibit C is a true and correct copy of a printout of certain "Form View" pages from the Lotus Notes database, as it existed at the time of our November 3, 1998 meeting. Exhibit C bears my date stamp showing the November 3, 1998 date. Exhibit C is a copy of some of the papers that I used during the November 3, 1998 meeting to discuss with QSMI various edits that I was requesting to the application. Exhibit C includes field names for the data in a professional service practice

management application of the invention that correspond to field names that were implemented, through servers, in other of the firm's databases (such as word processing, docketing, etc.) to draw data from certain of these other applications into the Lotus Notes application.

15. Exhibit C evidences not only that the concept was completed by this time but also that work on the project was continuing through the Summer of 1998. The Lotus Notes Form View had a function at that time that indicates when the last edit is made to the particular form. For example, the "Client Form" starting on the first page of Exhibit C, was edited by Carrington V. Thompson ("cvt"), of QSMI, on September 28, 1998, as reflected by the edit information depicted in the notation: "last modified by cvt 9/28/98," in the lower left hand corner of the first page of Exhibit C. The "Event Form," which begins at the fourth page of Exhibit C, bears editing information in the lower left-hand corner of the page establishing that this form was "last modified by cvt 7/28/1998" and on the seventh page of Exhibit C establishing that this form was "last modified by cvt 8/3/1998." Other forms in Exhibit C include similar information, reflecting ongoing activity on the project during the Summer and Fall of 1998. These records evidence that I had conceived and was working on reducing to practice the invention, at least as early as July 28, 1998.

16. Work continued on this project from the first quarter of 1998, when I retained QSMI and continued for several years, through the filing of the priority document in 2001, and continuing after the priority document was filed through 2002. Exhibits B and C reflect the concept of various of the features of the claimed invention. The field names indicated in the rectangular boxes on the right side of the forms shown

in Exhibit C represent field names in Lotus Notes of various data fields that were drawn from various other databases within the firm. Information such as "Client_Name" and "Client_No" shown on page 1 of Exhibit C were drawn from the firm's master client list maintained in various databases in applications such as WordPerfect, Lotus, and/or Excel. Prosecution events, such as "Patent_Routing" and "TM_Routing" shown on page 2 of Exhibit C, or other information, such as "Invention Detail, as shown on page 6 of Exhibit C, were intended to be drawn from the firm's docketing system. At that time, the firm used a version of the CPI software application for docketing, which was a proprietary or relatively "closed" system, that was not in a compatible data format with data from other sources of data such as the Client list or Client number or other bibliographic information.

17. I was diligent in reducing to practice the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, as reflected in the Amendment and Response filed with this Declaration, from at least as early as March or April 1998, and in no event later than July 28, 1998, to the filing date of the application. The filing date of the earliest co-pending application upon which priority is claimed for the present application, U.S. Provisional Application No. 60/337,158, is December 10, 2001.

18. Attached hereto as Exhibit D is a copy of the Appendix that was submitted with co-pending application, Serial Number 10/315,196, filed December 10, 2002. Exhibit D also reflects continual, ongoing work on the claimed invention.

19. Exhibit D, as is Exhibit C, is a printout of various forms of the Lotus Notes database. Exhibit D was made after Exhibit C. As does Exhibit C, Exhibit D contains details evidencing when certain edits were made to the forms. The Examiner's attention

is directed to, for instance, pages A-17 and A-56 of Exhibit D, which depict a professional services project management application that can query different data sources with differing key values and provides a mapping between various fields. The software returns values to the application from the data sources in accordance with embodiments of the present invention. These functions are associated with claimed features, including a "first server" cooperating with a "second server" to transfer data to the application. It further evidences compiling data into the professional services practice management applications from different applications, including an ODBC-compliant application ("ODBC Column"). In this instance, the Notes Field reflects the professional services project management database in a common data format and the ODBC Column reflects data in an "open" or "portable" data format. Page A-17 of Exhibit D reflects that "Notes Field" maps to a "Field Type," an "ODBC Column" in the applicable ODBC-compliant database, and a "Column Type".

20. Attached hereto as Exhibit E is a copy of my prior Declaration in this application, along with a "Synopsis" of a version of a Lotus Notes database, embodying the present invention. The Synopsis appended as part of Exhibit E was printed on November 3, 1999. It reflects ongoing work on one version of the software application from March 3, 1999, through November 3, 1999. The version of the software reflected in Exhibit E—Version 2.5.5—memorializes the continuing evolution of the software through various edits made since QSMI began working on the project in the first half of 1998. This version 2.5.5 was created on March 18, 1999, as evidenced by the entry on the sixth line of the second page of the Exhibit, which reads: "Date Created: 03/18/1999 11:50:32 AM." Exhibit E further reflects that the last modification to

this particular version 2.5.5 of the software was made on "11/3/1999 4:38:52 PM," on the following line.

21. Exhibit E contains a detailed description of the software as it existed at that time, reflecting the mapping of the various fields of data from other software applications where the data was stored, as well as the details of various pull down lists, scripts, and other details of the operation of the software at that time. The version of the software expressed in Exhibit E was designed to take data having different data formats from two or more applications, including applications in which the data is maintained in relatively incompatible formats, such as, at that time, a CPI docketing system, TMC time and billing system, and other databases that maintained data in Notes, Word, Lotus, Excel, and/or other applications, and combine them in a common or single data format and display the data to the user, avoiding the need for the user to access multiple, relatively incompatible software applications in order to access the data of interest to managing a professional services project, such as a patent or trademark application.

22. Exhibits F, G, H, I, and J, are a series of notes and emails reflecting changes made to the Lotus Notes software application from November 3, 1999, through February 24, 2000. I held a meeting with QSMI on November 3, 1999, to discuss the continuing work on the application. Exhibit F is a set of my typewritten notes, which I printed out on January 14, 2000. Exhibit F bears my handwritten notation at the upper right hand corner that it was for the November 3, 1999 meeting, at which I outlined a series of changes that I was requesting that QSMI make to the Lotus Notes software application embodying aspects of the invention.

23. Exhibit G is copy of an email, dated November 8, 1999, containing a response from Mike Hoagland, of QSMI, to certain of the requests that I made during the November 3, 1999, meeting.

24. Exhibits H, I, and J are a series of emails from one of the Secretaries in my Intellectual Property Practice Group, detailing the status of certain of the changes that I requested at the November 3, 1999 meeting. Exhibit H is an email dated November 22, 1999, detailing the status of certain of the changes. (A reference to certain confidential and proprietary information has been redacted at the point indicated.)

25. Exhibit I is an email dated December 10, 1999, detailing the continuing progress on the changes requested at the November 3, 1999 meeting with QSMI. (References to certain confidential and/or proprietary information have been redacted at the points indicated.) Similarly, Exhibit J is an email, dated February 14, 2000, detailing additional progress on certain of the changes requested on November 3, 1999. (A reference and the attachment to Exhibit J, containing certain confidential and/or proprietary information, have been redacted.)

26. On November 22, 1999, I made additional notes, detailing the integration into the then-current version of a professional services practice application of the invention of certain accounting information that was part of the concept. Exhibit K is a series of handwritten charts that were prepared by me on November 22, 1999, depicting various ways in which accounting data from the firm's proprietary financial accounting system might be integrated into, and displayed as part of the professional services practice management application of the present invention. This data was maintained at

that time in a software application provided by TMC and was a "closed" or "proprietary" system in which the data at that time was not maintained in a "portable" format.

27. Work continued on the software application throughout 2000. Exhibit L is a copy of my handwritten notes made and updated at various times between April 18, 2000 and August 22, 2000, memorializing some of the meetings about, and changes to, a software application embodying aspects of the present invention that I had during this period. Exhibit L reflects on page 4, in the entry for "8-22-00" that, by August 22, 2000, we were successfully driving information from the docketing system to the Lotus Notes application software. This docketing information, along with the accounting information from the financial services software had been among the more difficult problems to solve, due to the proprietary and, consequently, relatively "closed" format of various prior versions of the docketing software.

28. Exhibit M is a table, dated September 7, 2000, prepared by one of my staff at my direction, detailing various suggestions and bug fixes that I requested from QSMI. Throughout 2000 and 2001, I continued to meet and communicate with QSMI, to discuss improvements and changes to the Lotus Notes software application embodying the present invention. Among the changes identified in Exhibit M, in the fifth row of the table, is creation of hypertext links interfacing with databases to transfer information to the professional services practice management application. In the ninth row of Exhibit M, I requested changes to "Pull Foreign Associate names from Marketing database . . . " data that was maintained at that time in a relatively "open" or "portable" data format.

29. Exhibit N is a copy of my handwritten notes for a meeting with QSMI on September 22, 2000, at my offices, during which we discussed the status of the

software and progress to date. Among the notations in Exhibit N is a note on the first page beside the bullet heading "(CPI)"—the docketing software we were using at the time—that the information could be moved from CPI 2000 (which at that point employed a Microsoft Access database) to Lotus Notes through the use of a SQL server.

30. One of the issues I discussed with QSMI during the September 22, 2000, meeting was training on the software application. Attached hereto as Exhibit O is a copy of a preliminary draft of training materials QSMI prepared at my request for the Lotus Notes practice management software application embodying aspects of the invention. Exhibit O reflects the claimed functionality of the invention to combine data useful for management of a professional services practice and make it available to the user in a repository, avoiding the need to access multiple, potentially incompatible software applications having incompatible data formats.

31. On February 20, 2001, I met again with QSMI to discuss the continuing work on the software. Exhibit P is a copy of a letter from QSMI to me, dated April 6, 2001, memorializing the status of the issues we had discussed at our February 20, 2001, meeting. (The indication "IP Agenda" database refers to the name that QSMI gave the software project which was written in Lotus Notes software and is not a reference to a Lotus Agenda software application platform.) Exhibit P memorializes, among other things, the task, in item No. 6, to "create scheduled or manual data exchanges to load data from CPI and TMC Finance databases into the IP Agenda Database on a periodic basis." Exhibit P reflects the concept of the invention by compiling data from multiple applications, including proprietary applications, some of

which may be in incompatible data formats, and making the data available in a practice management application.

32. I met again with QSMI on April 6, 2001. Exhibit Q is a copy of my handwritten notes of my April 6, 2001, meeting with QSMI, detailing further work on and improvements to the software.

33. Exhibit R is a copy of my typewritten notes of our April 6, 2001, meeting, reflecting continuing activity to refine the software application as well as a schedule of additional meetings to continue our development work.

34. I met again with QSMI on April 23, 2001. Exhibit S is a copy of my typewritten notes from our April 23, 2001, meeting, detailing additional work being done on the software. The entries at Paragraphs I.A.1. and I.A.2. reflect drawing data from the TMC and address book databases, which were at that time in different and relatively incompatible formats. The entry at Paragraph I.B.4. reflects my instruction to draw data from TMC, which was at that time in a relatively "closed" or "proprietary" format. The entry at Paragraph III.A.4. of Exhibit S reflects the functionality of pulling data from different applications, such as CPI, and making it available in a professional service practice management application of the invention. The entry at Paragraph III.B.1.b. reflects my instructions to QSMI to draw data from another database that was maintained in a different format, the i Enterprise Database, which was being used to maintain address and contact information. Various other entries in Exhibit S reflect different databases and different data formats.

35. Exhibit T is a letter from Carrington Thompson, of QSMI, to me, dated May 4, 2001, memorializing our April 23, 2001, meeting, and providing additional information

regarding the further improvements that I requested in the software. Among the tasks outlined in QSMI's proposal is to: "Create scheduled or manual data exchanges to load data from CPI and TMC Finance databases into the IP Agenda Database on a periodic basis." CPI was the docketing system and TMC was the financial accounting software application that I was using in my law practice at that time. These CPI and TMC applications are two of the applications that I was integrating into a professional services project management application of the invention. TMC, in particular, was at that point a proprietary application that maintained data in a relatively "closed" or "proprietary" format.

36. Exhibit U is a memo from me to QSMI and others in my firm, dated May 29, 2001, detailing the additional changes that I discussed and agreed upon with QSMI at an April 23, 2001, meeting with QSMI. (Certain pages of Exhibit U, containing proprietary and/or confidential information, have been redacted from the attachments.) These notes reflect the functionality of combining data from various incompatible formats, including relatively "open" or "portable" formats, such as word processing and HTML applications, with data from other, relatively "closed" or "proprietary" formats, such as docketing and financial accounting systems in use at law firms at this time, and making the information available in a common format in one interface, avoiding the need for the professional to access multiple inconsistent software applications to review the data pertinent to a project.

37. For example, the "Document Links" section of Exhibit U, reflects the functionality of linking documents from other applications through icons. The "Project Management" section of Exhibit U reflects tasks that include tracking project entries

from an ODBC-compliant application, such as Microsoft Project, in addition, to drawing data maintained in a different format from the CPI database. The "Budgeting" section of Exhibit U reflects integrating tasks with budgeting, finance and billing data that is maintained in other data formats from another application (TMC at that time) in which it was maintained in a relatively "closed" or "proprietary" data format.

38. Exhibit V is a copy of my typewritten notes from a meeting with QSMI on May 31, 2001, discussing, among other issues, various alternatives for integrating financial information from the firm's accounting system into a software application of the invention. Exhibit V reflects claimed features of the present invention, namely, accessing data from different applications in different data formats, including the option of drawing data from an application in which it is maintained a relatively "closed" or "proprietary" format. Specifically, under "Section II. Budget Functionality," Exhibit V reflects drawing information from various applications in which it is maintained in various data formats, including in sub-heading "A. Options:", various ODBC-compliant formats; and in "Section B. Accounting Issues:", drawing data from a TMC database, which was at that time maintained in a relatively "closed" or "proprietary" data format. Page 3 of Exhibit V also includes a flow diagram ("6. Flowchart") and accompanying list of various applications and data formats. ("TRAQCS" refers to the name I had given internally to a professional services practice management software application embodying the invention.)

39. Exhibit W is a copy of my typewritten notes from my June 11, 2001, meeting with QSMI, during which we discussed various improvements to the software.

These notes reflect various ongoing tasks associated with updating and improving a software application embodying the invention.

40. Exhibit X is a copy of my typewritten notes of my June 25, 2001, meeting with QSMI, during which we discussed specific budgeting parameters that I had requested be included in the software application. Exhibit X also includes a "Patent Mapping," detailing the mapping of certain other fields from the CPI docketing system to a professional services project management software application embodying the invention.

41. Exhibit Y is a copy of my notes of a July 11, 2001, meeting with QSMI, detailing the status of various improvements to the software, including, in "Section IV. Accounting (TMC)" importing accounting data from a "proprietary" TMC financial accounting system (page 2) in which it was maintained in a relatively "closed" or "proprietary" data format, as well a ODBC-compliant data, such as data from a Microsoft Project application ("V. Microsoft "Project").

42. Exhibit Z is a copy of my typewritten notes from an August 7, 2001, meeting with QSMI, during which we discussed the status of various changes that I had requested to the software. Among the elements discussed, "Section II. Milestones" reflects the importation of data from the CPI docketing system and correlating this data with milestones in the TRAQCS application. "Section V. Project/Budget Strategy" reflects under "Section A. Options:", various options for integrating data in a relatively proprietary data format from a TMC time and billing system. Exhibit Z memorializes the option of using a Cold Fusion server to incorporate this data.

43. During August and September 2001, I remained in continual contact with QSMI regarding the status of these various changes to the software application. Exhibit AA is an undated copy of QSMI's "Final Status Report," detailing the status of the integration of the various aspects of the invention. Among the functionality it memorializes is: integration of the practice management software application of the invention with the firm's email system (Section I.A.); drawing data on foreign associate address and event data from the CPI application (Section II.); drawing address data from an the firm's i Enterprises Address Book, and the user's address books, in which it is maintained in different data formats at least with respect to the i Enterprises database on one hand and the user's address books on the other (Section III.); and drawing accounting data from the firm's TMC time and billing system (Section IV.)

44. U.S. Provisional Application No. 60/337,158, upon which the current application claims priority was filed on December 10, 2001.

45. Following the filing of the provisional application, I continued to work with QSMI to refine the software application.

46. Based on this continual activity from the period of March or April, 1998—and no event later than July 28, 1998 for which I have provided contemporaneous documentation with this Declaration—and continuing through and after December 10, 2001, when I filed my provisional application, I exercised continual and diligent efforts to reduce to practice the invention of claims 1-3, 7-25, and 29-55 of the above-identified application.

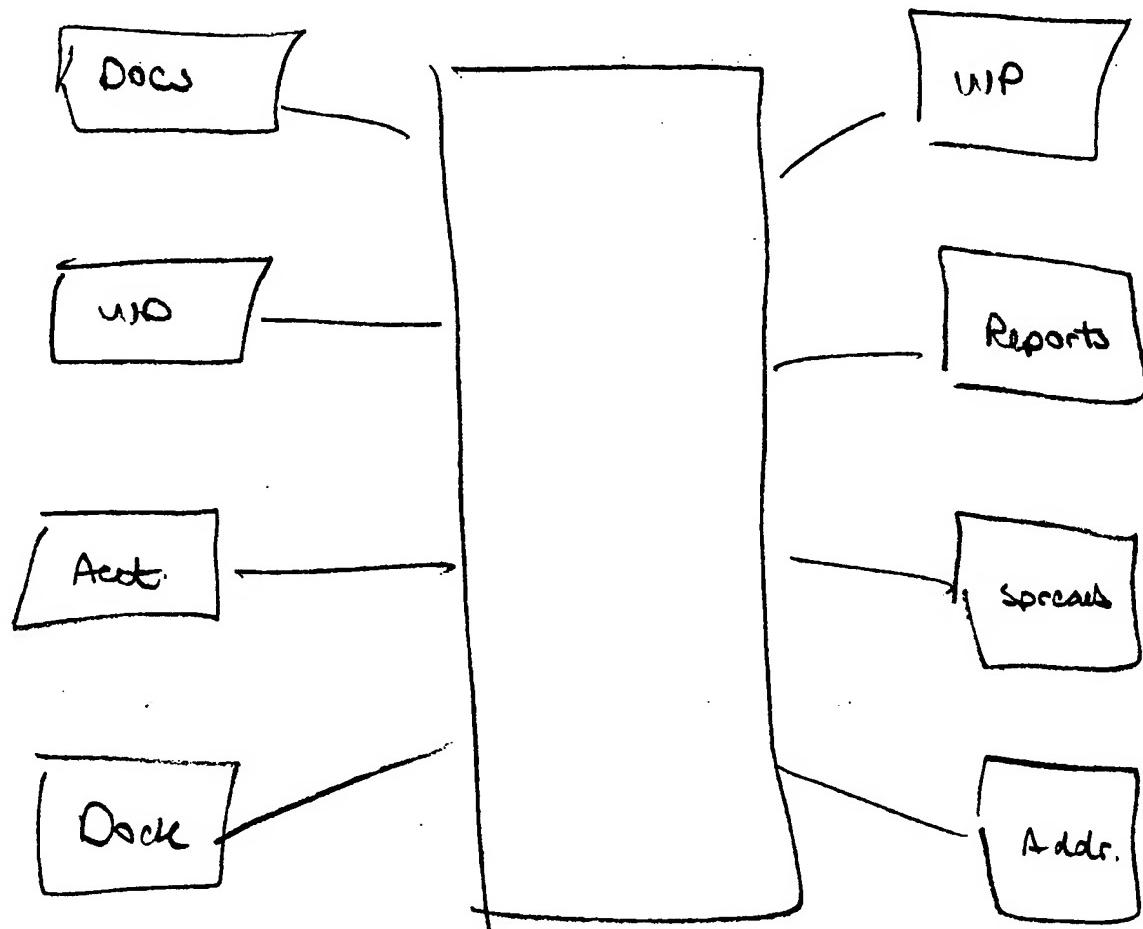
47. I declare further that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true;

and further, that the statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title of the United States Code, and that such willful false statements may jeopardize the validity of the application or any patents issuing thereon.

Date: January 21, 2009


PATRICK J. COYNE
Inventor

Exhibit A



PATENT

TM

Bibliographic

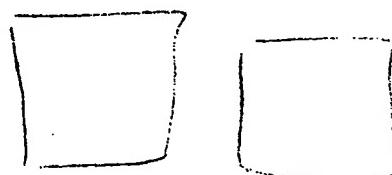
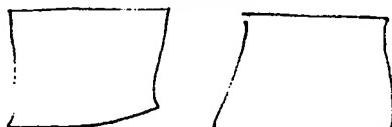
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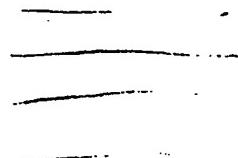
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[--- + + ---] (TMc) — ~~claims~~
or
specification
(typed or
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abstract
(scanned or
typed)



**Edits to Database
Meeting with QSMI
(Nov. 3, 1998)**

- ✓ 1. Client View (Alphabetical):
 - a. Leave sorting of Clients alphabetical, change title
 - b. Add sorting features to sort matters:
 - i. By Matter Alphabetically
 - ii. By Matter Number
 - c. Collapse the Client View upon opening
- ✓ 2. Client View (By Number):
 - a. Change Title (as above)
 - b. Add sorting features to sort matters:
 - i. By Matter Alphabetically
 - ii. By Matter Number
 - c. Collapse the Client View upon opening
- 3. Add Action buttons at Database Manager
 - a. Edit Routing List
 - b. Edit Project
 - c. Edit Event
 - d. Edit Task
- 4. Add email Routing Option on every view
 - a. Client
 - b. Matter

- c. Project
 - d. Event
 - e. Task
- ✓ 5. Create Agent to Conform all names to the present convention of full name sorted by last name
- ✓ 6. Add periods in responsible attorney names on Keyword List
7. Responsible Attorney View
- ✓ a. Matter – sort alphabetically
 - ✓ b. Project – sort alphabetically
 - ✓ c. Event –
 - i. Change order of columns in the view placing Date as first column
 - ii. Sort by date (Date of Creation, not due date)
 - ✓ d. Task –
 - i. Change order of columns in the view placing Date as first column
 - ii. Sort by date (Due Date not date of creation)
 - ✓ e. Add "Event and Task" View option under Responsible Attorney View:
 - i. Use format of Event/Task subviews but Change order of columns in the view placing Date as first column
 - ii. Sort by date
8. Closing Out:
- a. Events –
 - i. do not require certification for retiring events
 - ii. Do track who, and when the event was retired

iii. Retire events to a master archive file that has all of the data that was in the database (Call it "archive")

b. Task:

- i. Certification system you have written appears workable
- ii. Move from Project to Task level

9. Task View:

- a. Change order of columns in view to place Date first
- b. Sort by Date (Due Date, not date of creation)

10. Events & Tasks View

- a. Change to View Open Tasks by Client

b. Two Subviews:

i. By Client

(1) Columns:

- (a) Due Date
- (b) Task
- (c) Responsible Attorney
- (d) Project
- (e) Matter (Name and Number)

ii. By Responsible Attorney

(1) Columns:

- (a) Due Date
- (b) Task
- (c) Project

- (d) Matter (Name and Number)
- (e) Client (Name and Number)

11. **Calendar Views:**

- a. Events --
 - i. Sort by Event Date
- b. Tasks --
 - i. Sort by Due Date
- c. Add "Events and Tasks" Subview
 - i. Both
- d. Add Client Number to "Mouse Over" view
- e. Add Matter name and number to right of client number in "Mouse Over" view

✓ 12. Add Database Administration to Every View

13. **Client Report:**

- a. QSMI will prepare and present proposed reporting format reporting Client, matters, Projects, and Events for a particular client
- b. Operable at Client (all matters) or Matter levels simply by highlighting a client in Client View or a Matter in Matter View
 - i. Client Level Report:
 - (1) Cover Page detailing Client document
 - (2) Single (preferred) page for each matter detailing
 - (a) Projects open under that matter
 - (b) Events for each project
 - ii. Matter Level Reporting
 - (1) Single page having selected

- (a) Client information,
- (b) Matter information
- (c) Project
- (d) Events

14. Management Exceptions Report

- a. CSRS will supply list of triggering events and required follow up events
- b. QSMI will present proposal for exceptions report format based upon triggering event data supplied by PJC

15. Ticklers

- a. CSRS will supply ticklers generated in response to specific events
- b. QSMI will propose tickler format (tailored by Project type and (1) responsible attorney and (2) manual button)

16. Location of Date information

- a. Reorder Creation date (automatically generated and editable) and Due Date into first subform on window

17. QSMI will investigate and if feasible propose work around for moving events and tasks from one project to another, if inadvertently entered under incorrect Project type

✓ 18. Add estimated Completion Time and Running Total by responsible attorney information to all Task Views

19. QSMI will propose list of required fields -- validated for data entry to be accepted

20. Display hits on searches higher on screen, if possible

21. Add feature allowing Manual Routing slip to be edited (at least for responsible Attorney)

Client Form

Hidden Fields:

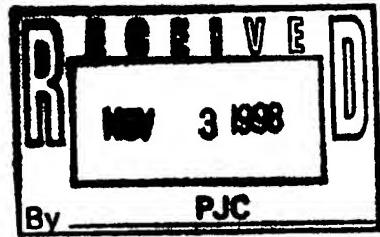
Profile flags:

COLLIER, SHANNON, RILL & SCOTT, PLLC

Please provide the following Client Information:

Click here to add a new contact or change existing contact information

Click here to add a new contact address or change existing contact address.



Attorney Information

Document Statistics

last modified by cvt 9/28/98

status: o.k.

COLLIER, SHANNON, RILL & SCOTT, PLLC

Default Description Profile

Event Descriptions

**New Client
Notification:** NewClient_Routing

**New Project
Notification:** NewProj_Routing

New Event Prosecution: Patent* Patent_Routing
Notification:

Prosecution: TM_Routing
*Trademark**

Prosecution: Copyright Cpy_Routing

*Litigation** DLit_Routing

Counsel and Advice CA_Routing

Other Oth_Routing

New Task Prosecution: Patent* Patent_Routing_1
Notification:

Prosecution: TM_Routing_1
*Trademark**

Prosecution: Copyright Cpy_Routing_1

*Litigation** DLit_Routing_1

Counsel and Advice CA_Routing_1

Other Oth_Routing_1

**Responsible
Attorneys:** ProAtty

Manual Routing

**Litigation Routing Copy 1
Slip:** *Selected on the Form*
Copy 2 *Selected on the Form*

Prosecution Routing *Copy 1 - Docket Slip:*

ProsRouteCpy1

Copy 2

Selected on the Form

Copy 3

ProsRouteCpy3

* These notifications are for both electronic and manual routing and are in addition to the ones which may be selected from the addressbook at the time of document composition.

Event Form

hidden fields: ClientDocID | MatterDocID | ProjectDocID | EventDocID | Event | Sn | PropClose | description_all | Ref | FormName

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0

Client Name & Number: **Matter & Matter Number:** **Project:** **Event Name:** **Event Date:** **Event Description:** **Responsible Attorney:** **Routing Information:** **Routing List:**

Event Subtask Information**Event Closure****Document Statistics**

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields: [Hide](#) [FirstLast](#)

Event Form Keywords

Event Types

Copyright Events:	<input type="button" value="ET1"/>
Patent Events:	<input type="button" value="ET2"/>
Trademark Events:	<input type="button" value="ET3"/>
Counsel & Advice Events:	<input type="button" value="ET4"/>
Litigation Events:	<input type="button" value="ET5"/>
Other Events:	<input type="button" value="ET6"/>

Event Descriptions

Prosecution: Trademark:	<input type="button" value="ED1"/>
Prosecution: Patent:	<input type="button" value="ED2"/>

Project Form Keywords

Project Types

Prosecution: Copyright:	<input type="button" value="PT1"/>
Prosecution: Trademark:	<input type="button" value="PT2"/>
Prosecution: Patent:	<input type="button" value="PT3"/>

Hidden Fields:

COLLIER, SHANNON, RILL & SCOTT, PLLC

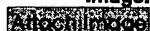
Matter Name:

Matter No:

Matter Description:

Responsible Attorney:

Billing Attorney:

Image:


(If Applicable)

Invention Detail

Client's Billing Number:

Inventor(s):

Serial Number:

Related Matter Nos:

Classes (POFA, FA):

Power of Attorney:

Conception Date:

Reduction to Practice:

Inhouse Disclosure Date:

External Disclosure Date:

[note: 1 year after an invention is disclosed out of house, if a patent app is not filed an inventor loses the right to file; therefore, if "Filing Date" is blank after, say, 50 weeks, a tickler message must be sent out]

To Whom?

Document Statistics

PropClose_1

last modified by cvt 8/3/98
status: o.k.

Hidden Fields:

Profile Flags:

COLLIER, SHANNON, RILL & SCOTT, PLLC

Project -

Client Name & Number:

Matter Name & Number:

Project:

Description:

Country:

Associate:

Associate Address:

Responsible Attorney:

Project Detail

<Computed Subform>

Document Statistics

last modified by cvt 9/28/98

status: o.k.

hidden Fields FirstLast

COLLIER, SHANNON, RILL & SCOTT, PLLC

Default Routing Profile

Electronic Routing

New Client
Notification: NewClient_Routing

New Project
Notification: NewProj_Routing

New Event *Prosecution: Patent** Patent_Routing
Notification:

Prosecution: TM_Routing

*Trademark**

Prosecution: Copyright Cpy_Routing

*Litigation** DLit_Routing

Counsel and Advice CA_Routing

Other Oth_Routing

New Task *Prosecution: Patent** Patent_Routing_1
Notification:

Prosecution: TM_Routing_1

*Trademark**

Prosecution: Copyright Cpy_Routing_1

*Litigation** DLit_Routing_1

Counsel and Advice CA_Routing_1

Other Oth_Routing_1

Responsible
Attorneys: ProAtty

Manual Routing

Litigation Routing *Copy 1* Selected on the Form
Slip:
Copy 2 Selected on the Form

Prosecution Routing *Copy 1 - Docket Slip:*

ProsRouteCpy1

Copy 2

Selected on the Form

Copy 3

ProsRouteCpy3

* These notifications are for both electronic and manual routing and are in addition to the ones which may be selected from the addressbook at the time of document composition.

hidden fields:

COLLIER, SHANNON, RILL & SCOTT, PLLC

0

Client Name & Number:

Matter & Matter Number:

Project:

Task Name:

Due Date:

Description:

Responsible Attorney:

Subtask Information

Task Closure

Document Statistics

last modified by cvt 8/3/98
status: needs some work

Email Notification

Recipients:

Subject:

Comments:

clients_Billing Number	clients_billing (edit control)
Inventor Name	inventor (edit control)
Serial Number	serial_number (edit control)
Related Matter No.	related_matter_no (edit control)
PoFA/PA	pofa_fa (edit control)
Power of Attorney	PoA (combobox)
Conception Date	concept (edit control)
Production Practice	rp (edit control)
Inhouse Disclosure	inhouse_disclos (edit control)
External Disclosure	external_disclos (edit control)
Whom?	whom (edit control)

last modified by: cvt 9/20/98

status: o.k.

hidden fields:

NOTE: This is the Project Profile Form. It is used in the ProjectTypes view to compute the @ENVIRONMENT(SubType) variable when creating a New Task from the Matter Form or the Client View.

Project Type:

hidden fields:



COLLIER, SHANNON, RILL & SCOTT, PLLC

client

cli_mat

Litigation Routing Slip

Re: **lit_rout_re**

Document: **document**

Routed By: **route_author** On: **cre_date**

Routing Information

Copy 1: **route_to**

Copy 2: **lit_route_to**

last modified by: cvt 9/23/98

status: need feedback on what info is to go into the "lit_rout_re" and "document" fields.

hidden fields:

REF1



COLLIER, SHANNON, RILL & SCOTT, PLLC

client

route_type

Client Number:

Reference:

Date Processed: By:

Routing Information

Copy 1: Docket/Byron Derringer

Copy 2: Responsible Attorney:

Copy 3: Routed To:

Patrick Coyne _____

Shelly Silver _____

Filing Date:	filng_date (edit control)
Term Date:	term_date (edit control)
Why Term:	why_term (combobox)
Maint:	maint (edit control)

Last modified by cvt 8/3/98

Status:

	first_use (edit control)
	i_state_use (edit control)
	filing_date (edit control)
	termination (combobox)
	term_date (edit control)
	how_term (combobox)
	renewal (edit control)
	radios (radio button group)

last modified by cvt 9/21/98

status: o.k.

APPENDIX

Client Form

Hidden Fields: SendTo DocType ClientDocID PropClose LNameResult
Profile flags: Title FirstName MiddleInitial LastName Suffix PhoneNumber Fax StreetAddress City
State ZIP Country Email DocID Contract_Address_1 Contact_Name_1

 COLLIER SHANNON SCOTT, PLLC

Client Form

Please provide the following Client Information:

Client Name:	<u>Client_Name</u>
Client Number:	<u>Client_No</u>
Contact Name:	<u>Contact_Name</u>
Contact Address:	<u>Contact_Address</u> <u>PhoneNumbers</u>
Line of Business:	<u>LOB</u>
Products / Services:	<u>Prod_Line</u>

Attorney Information

Referral:	<u>Referred_By</u>
Originating Attorney:	<u>Orig_Aty</u>
Billing Attorney:	<u>Bill_Aty</u>
Billing:	<u>FeeBasis</u>
Alternative:	<u>NonStandardFee</u>
Related To:	<u>RelateClient</u>

Document Statistics

last modified by cvt 9/28/98
status: o.k.

Client Form

Hidden Fields:	SendTo	DocType	ClientDocID	PropClose					
Profile flags:	Title	FirstName	MiddleInitial	LastName	Suffix	PhoneNumber	Fax	StreetAddress	City
State	ZIP	Country	Email	DocID					

**COLLIER SHANNON SCOTT, PLLC**

Client Form

Please provide the following Client Information:

Client Name:	<u>Client_Name</u>
Client Number:	<u>Client_No</u>
Contact Name:	<u>Contact_Name</u> <u>Contact_Name_1</u>
Contact Address:	<input checked="" type="checkbox"/> Click here to add a new contact or change existing contact information <u>Contact_Address</u> <u>Contact_Address_1</u> <input checked="" type="checkbox"/> Click here to add a new contact address or change existing contact address.
Line of Business:	<u>LOB</u>
Products / Services:	<u>Prod_Line</u>

Attorney Information

Referral:	<u>Referred_By</u>
Originating Attorney:	<u>Orig_Atty</u>
Billing Attorney:	<u>Bill_Atty</u>
Billing:	<u>FeeBasis</u>
Alternative:	<u>NonStandardFee</u>
Related To:	<u>RelateClient</u>

Document Statistics

last modified by cvt 9/28/98
status: o.k.

<input checked="" type="checkbox"/> Client's Billing Number	: clients_billing (edit control)
<input type="checkbox"/> Inventor(s)	: inventor (edit control)
<input type="checkbox"/> Serial Number	: serial_number (edit control)
<input type="checkbox"/> Related Matter No.	: related_matter_no (edit control)
<input type="checkbox"/> Classes (POFA/F/A)	: pofa_fa (edit control)
<input type="checkbox"/> Power of Attorney	: PoA (combobox)
<input type="checkbox"/> Conception	: concept (edit control)
<input type="checkbox"/> Reduction to Practice	: rtp (edit control)
<input type="checkbox"/> Inhouse Disclosure Date	: inhouse_disclos (edit control)
<input type="checkbox"/> External Disclosure Date	: external_disclos (edit control)
<input type="checkbox"/> To Whom	: whom (edit control)

last modified by: cvt 9/20/98

status: o.k.

Phone Labels - 2nd Phone Numbers	
PhoneLabel_1 (edit)	OfficePhoneNumber
PhoneLabel_3 (edit)	OfficeFAXPhoneNumber
PhoneLabel_5 (edit)	CellPhoneNumber
PhoneLabel_2 (edit)	PhoneNumber (edit)
PhoneLabel_4 (edit)	HomeFAXPhoneNumber
PhoneLabel_6 (edit)	PhoneNumber_6 (edit)

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo

COLLIER SHANNON SCOTT, PLLC

Matter Form

Client_Name: [Client_No]

Matter Name: [Matter_Name]

Matter No.: [Matter_No]

Matter Creation Date: [cre_date]

**Related Matter
Numbers:** [description]

Responsible Attorney: [resp_atty]

Billing Attorney: [Bill_Atty]

[StandardImage] [Image]

Document Statistics

last modified by cvt 8/3/98

status: o.k.

Hidden Fields: ClientDocID MatterDocID ProjectDocID RespAtty_init StreetAddress City State ZIP

Country ProjectNumFC

Profile Flags: SubType PropClose ProjMatter



COLLIER SHANNON SCOTT, PLLC

Project Form

Project -

Client Name & Number: Client_Name [Client_No]

Matter Name & Number: Matter_Name [Matter_No]

Project: Project

Project Creation Date: cre_date

Description: PDescrip

Country: ProjectCountry

Create Separate Country
Projects: SepProj

Foreign Associate: Associate

Associate Address: Assoc_Address [AssocAddress]

Responsible Attorney: resp_atty

Comments: PComments

Image: Image
[AttachImage]

Project Detail

<Computed Subform>

Document Statistics

PDescrip | clients_billing | Client_Name | Client_No | Project | RespAtty_init | ProjectCountry



Please enter all dates in the format MM/DD/YY.

Next Action: Pr_Next_Action
Date Action Due: Pr_Action_Date
Priority: Pr_Priority
Estimated Hours: Pr_Hours

Action by: Pr_NextActionby
Date Complete: Pr_DateComplete
Status: Pr_Status
Summary of action taken: Pr_Summary

Project Action Archive

Completed Actions: Pr_Archive

hidden fields: DocType

NOTE: This is the Project Profile Form. It is used in the ProjectTypes view to compute the @ENVIRONMENT(SubType) variable when creating a New Project from the Matter Form or the Client View.

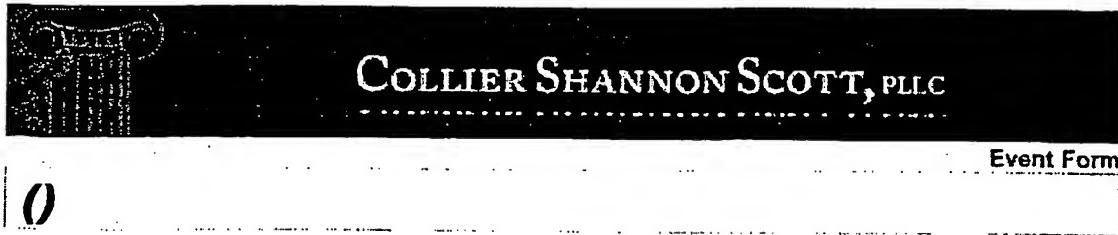
Project Type: ProjectType

A-8 ✓

Approved
12.07.2003
jl

Event Form

hidden fields: ClientDocID | MatterDocID | ProjectDocID | EventDocID | Event | Sn | PropClose | description_all | Ref | FormName

**Event Form**

Client Name & Number:	<input type="text" value="Client_Name"/> [<input type="text" value="Client_No"/>]
Matter & Matter Number:	<input type="text" value="Matter_Name"/> [<input type="text" value="Matter_No"/>]
Project:	<input type="text" value="Project"/>
Date Event Created:	<input type="text" value="cre_date"/> <input type="text" value="cre_date_d"/>
Event Date (mm/dd/yy):	<input type="text" value="EventDate"/>
Anticipated Date to Achieve Next Milestone:	<input type="text" value="mstn_date"/>
Milestone/Event Name:	<input type="text" value="CopyrightEvent"/> <input type="text" value="PatentEvent"/> <input type="text" value="TrademarkEvent"/> <input type="text" value="CounselEvent"/> <input type="text" value="LitigationEvent"/> <input type="text" value="OtherEvent"/> <input type="text" value="TransactionalEvent"/>
Description:	<input type="text" value="PDescript"/>
Responsible Attorney:	<input type="text" value="resp_atty"/> <input type="text" value="resp_atty_1"/>
Routing Information:	<input type="text" value="lit_route_ev"/>

Event RetirementTo retire this event, press the button: Protect this form from Archive: Event Retired (date): Retired by:

UnHideEV ClosingEV

Document Statistics

Document Status:

Document History:

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields: | Hide FirstLast |

Event Form Keywords

Event Types

Copyright Events:	ET1
Patent Events:	ET2
Trademark Events:	ET3
Counsel & Advice Events:	ET4
Litigation Events:	ET5
Other Events:	ET6

Event Descriptions

Prosecution: Trademark:	ED1
Prosecution: Patent:	ED2

Project Form Keywords

Project Types

Prosecution: Copyright:	PT1
Prosecution: Trademark:	PT2
Prosecution: Patent:	PT3
Project Countries:	PC1
Project Application Types:	AT1

Client Form

Hidden Fields: SendTo DocType ClientDocID LNameResult
 Profile flags: FirstName MiddleInitial LastName Suffix PhoneNumber Fax Country Email
 DocID Contract_Address_1 Contact_Name_1 PropClose

[
]

Collier Shannon Scott

[
]

Client Form**Please provide the following Client Information:**

Client Name: Client_Name
Client Number: Client_No
Contact Name: Contact_Name
Contact Address: Contact_Address
Line of Business: LOB
Products / Services: Prod_Line

Attorney Information

Referral: Referred_By
Originating Attorney: Orig_Atty
Billing Attorney: Bill_Atty
Billing: FeeBasis
Alternative: NonStandardFee
Related To: RelateClient

Document Statistics

last modified by cvt 9/28/98
status: o.k.

Event Form

hidden fields: ClientDocID | MatterDocID | ProjectDocID | EventDocID | Event | Sn | PropClose | description_all | Ref

[
]

Collier Shannon Scott

[
]

Event Form

()

Client Name & Number:	<input type="text" value="Client_Name"/> <input type="text" value="Client_No"/>
Matter & Matter Number:	<input type="text" value="Matter_Name"/> <input type="text" value="Matter_No"/>
Project:	<input type="text" value="Project"/>
Date Event Created:	<input type="text" value="cre_date"/> <input type="text" value="cre_date_d"/>
Event Date (mm/dd/yy):	<input type="text" value="EventDate"/>
Anticipated Date to Achieve Next Milestone:	<input type="text" value="mistrn_date"/>
Milestone/Event: Name:	<input type="text" value="CopyrightEvent"/> <input type="text" value="PatentEvent"/> <input type="text" value="TrademarkEvent"/> <input type="text" value="CounselEvent"/> <input type="text" value="LitigationEvent"/> <input type="text" value="OtherEvent"/> <input type="text" value="TransactionalEvent"/>
Description:	<input type="text" value="PDescrip"/>
Responsible Attorney:	<input type="text" value="resp_atty"/> <input type="text" value="resp_atty_1"/>
Routing Information:	<input type="text" value="lit_route_ev"/>

Event Retirement

To retire this event, press the

Protect this form from Archive:	<input type="checkbox" value="ProtectFromArchive"/>
Event Retired (date):	<input type="text" value="TEDateComplete"/>
Retired by:	<input type="text" value="Retire_By"/>

UnHideEV ClosingEV

Document Statistics

Document Status:

Document History:

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo

[
]

Collier Shannon Scott

[
]

Matter Form

Client_Name [Client_No]

Matter Name:

Description:

Matter No:

Matter Creation Date:

Related Matters:

Responsible Attorney:

Billing Attorney:

Image:

Invention Detail

Document Statistics

last modified by cvt 8/3/98

status: o.k.

Hidden Fields: ClientDocID [MatterDocID] ProjectDocID RespAtty_init ProjectNumFC BudgetType
Profile Flags: SubType PropClose ProjMatter

[
]

Collier Shannon Scott

[
]

Project Form

Project -

Client Name & Number: Client_Name [Client_No]

Matter Name & Number: Matter_Name [Matter_No]

Project: Project

Project Creation Date: cre_date

Description: PDescrip

Country: ProjectCountry

Create Separate Country Projects: SepProj

Foreign Associate: Associate

Associate Address: Assoc_Address

Responsible Attorney: resp_atty

Comments: PComments

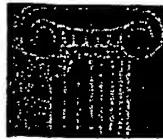
Image: Image

Project Detail

<Computed Subform>

Document Statistics

hidden Fields Pcontrol_ODBCPassword Tcontrol_ODBCPassword



COLLIER SHANNON SCOTT, PLLC

Data Transfer Configuration

Select which Database to configure: Database

Patent Mapping

Field Mapping

Notes Field	Field Type	ODBC Column	Column Type
PNotesField	PNotesFieldType	PODBCColumn	PODBCColumnType

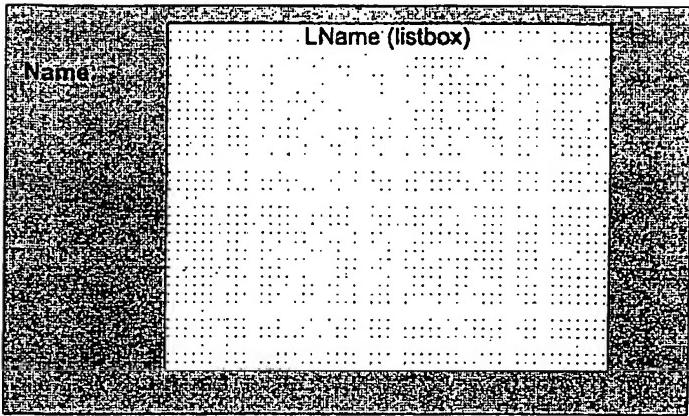
*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.

Trademark Mapping

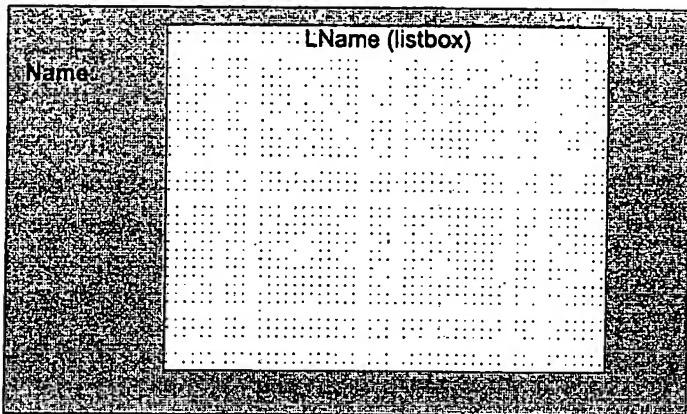
Field Mapping

Notes Field	Field Type	ODBC Column Type	Column Type
TNotesField	TNotesFieldType	TODBCColumn	TODBCColumnType

*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.



LNameResult



LNameResult



Email Notification

Recipients:

Subject:

Comments:

Subject

Body

CopyTo

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo



COLLIER SHANNON SCOTT, PLLC

Matter Form

Client_Name [Client_No]

Matter Name: Matter_Name

Description: description

Matter No: Matter_No

Matter Creation Date: cre_date

Related Matters: related_to

Responsible Attorney: resp_atty

Billing Attorney: Bill_Atty

Image:

Invention Detail Document Statistics

last modified by cvt 8/3/98
status: o.k.

Event Form

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID Event Sn PropClose description_all Ref FormName

**Event Form**

0

Client Name & Number: Matter & Matter
Number: Project: Date Event Created: Event Date (mm/dd/yy): Anticipated Date to
Achieve Next Milestone: Current Milestone this
Project is at: Is this Event the next
Milestone Event?:

Click HERE to select next milestone event.

 HIDDENEvent Name: Subject: Responsible Attorney: Routing Information: **Event Retirement**To retire this event, press the button: Protect this form from Archive:

Event Retired (date): TEDateComplete

Retired by: Retire_By

UnHideEV ClosingEV

Document Statistics

Document Status:

Document History:

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID PropClose FormName clients_billing inventor PComme



COLLIER SHANNON SCOTT, PLLC

Task Form

Client Name & Number:

Matter & Matter Number:

Project:

Comments:

Task Creation Date:

Projected Due Date:

Estimated Time to Complete:

Task Priority:

Task Status:

Assigned To:

Routing List:

Reminder Date:

Task Closure

Press button to initiate task closure:

Certificate of Completion

Responsible Attorney Certificate:

IP Docket Manager Certificate:

hidden fields: TEArchive RAClosed UnHideRA UnHideDM

Document Statistics

Document Status:

Document History:

last modified by cvt 8/3/98
status: needs some work

\$MessageType



Archive Entries: LogCount of LogTotal for ArchiveDate

Body

ArchiveTrailer

Hidden: Subject | Categories |

Hello

Archive Profile

ArchiveExpired

after ExpiredLife days

ArchiveLog

IncludeDoclinks

Archive Profile Editors:

ProfileEditors

Archive Server Name:

ArchiveServer

Archive Database Path: *

ArchivePath

*Enter the full path to the Archive database relative
to the Notes data directory, ie: apps\ArchiveDB

Change Responsible Attorney

Choose Responsible Attorney to Replace:

rpl_resp_atty

Choose New Responsible Attorney:

new_resp_atty

h
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f
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e
l
d
s

FormName

Collier, Shannon, Rill & Scott, PLLC

RptName

Created For: client

As of: ReportDate

RptType

Matter Name	Matter Number	Creation Date	Description
BodyName	BMat	BDate	BodyDes
BodyName_1	BMat_1	BDate_1	BodyDes_1
BodyName_2	BMat_2	BDate_2	BodyDes_2
BodyName_3	BMat_3	BDate_3	BodyDes_3
BodyName_4	BMat_4	BDate_4	BodyDes_4
BodyName_5	BMat_5	BDate_5	BodyDes_5
BodyName_6	BMat_6	BDate_6	BodyDes_6
BodyName_7	BMat_7	BDate_7	BodyDes_7
BodyName_8	BMat_8	BDate_8	BodyDes_8
BodyName_9	BMat_9	BDate_9	BodyDes_9
BodyName_10	BMat_10	BDate_10	BodyDes_10
BodyName_11	BMat_11	BDate_11	BodyDes_11
BodyName_12	BMat_12	BDate_12	BodyDes_12
BodyName_13	BMat_13	BDate_13	BodyDes_13
BodyName_14	BMat_14	BDate_14	BodyDes_14
BodyName_15	BMat_15	BDate_15	BodyDes_15
BodyName_16	BMat_16	BDate_16	BodyDes_16
BodyName_17	BMat_17	BDate_17	BodyDes_17
NextPage			

Client Matter Report for Client2 - Continued

Matter Name	Matter Number	Creation Date	Description
BodyName_18	BMat_18	BDate_18	BodyDes_18
BodyName_19	BMat_19	BDate_19	BodyDes_19
BodyName_20	BMat_20	BDate_20	BodyDes_20
BodyName_21	BMat_21	BDate_21	BodyDes_21
BodyName_22	BMat_22	BDate_22	BodyDes_22
BodyName_23	BMat_23	BDate_23	BodyDes_23
BodyName_24	BMat_24	BDate_24	BodyDes_24
BodyName_25	BMat_25	BDate_25	BodyDes_25
BodyName_26	BMat_26	BDate_26	BodyDes_26
BodyName_27	BMat_27	BDate_27	BodyDes_27
BodyName_28	BMat_28	BDate_28	BodyDes_28
BodyName_29	BMat_29	BDate_29	BodyDes_29
BodyName_30	BMat_30	BDate_30	BodyDes_30
BodyName_31	BMat_31	BDate_31	BodyDes_31
BodyName_32	BMat_32	BDate_32	BodyDes_32
BodyName_33	BMat_33	BDate_33	BodyDes_33
BodyName_34	BMat_34	BDate_34	BodyDes_34
BodyName_35	BMat_35	BDate_35	BodyDes_35

hidden fields:

FormName

Collier, Shanno

F

Created For: client

As of: ReportDate

Matter Name

BodyName

BodyName_1

BodyName_2

BodyName_3

BodyName_4

BodyName_5

BodyName_6

BodyName_7

BodyName_8

BodyName_9

BodyName_10

BodyName_11

BodyName_12

BodyName_13

BodyName_14

BodyName_15

BodyName_16

BodyName_17

NextPage

Client Matter Report for Client2 - Continued

Matter Name	Matter Number	Creation Date	Description
BodyName_18	BodyMatter_18	BodyDate_18	BodyDes_18

BodyName_19	BodyMatter_19	BodyDate_19	BodyDes_19
BodyName_20	BodyMatter_20	BodyDate_20	BodyDes_20
BodyName_21	BodyMatter_21	BodyDate_21	BodyDes_21
BodyName_22	BodyMatter_22	BodyDate_22	BodyDes_22
BodyName_23	BodyMatter_23	BodyDate_23	BodyDes_23
BodyName_24	BodyMatter_24	BodyDate_24	BodyDes_24
BodyName_25	BodyMatter_25	BodyDate_25	BodyDes_25
BodyName_26	BodyMatter_26	BodyDate_26	BodyDes_26
BodyName_27	BodyMatter_27	BodyDate_27	BodyDes_27
BodyName_28	BodyMatter_28	BodyDate_28	BodyDes_28
BodyName_29	BodyMatter_29	BodyDate_29	BodyDes_29
BodyName_30	BodyMatter_30	BodyDate_30	BodyDes_30
BodyName_31	BodyMatter_31	BodyDate_31	BodyDes_31
BodyName_32	BodyMatter_32	BodyDate_32	BodyDes_32
BodyName_33	BodyMatter_33	BodyDate_33	BodyDes_33
BodyName_34	BodyMatter_34	BodyDate_34	BodyDes_34
BodyName_35	BodyMatter_35	BodyDate_35	BodyDes_35

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FormName

Collier, Shannon

F

Created For: client

As of: ReportDate

RptType For Matt

Project Name	Creation Date	
Body_1	Body_2	Body_3

Select the Responsible Attorney to Remove

Attorney (combobox)

AttyTmp (static text)

Replace Clients or Matters

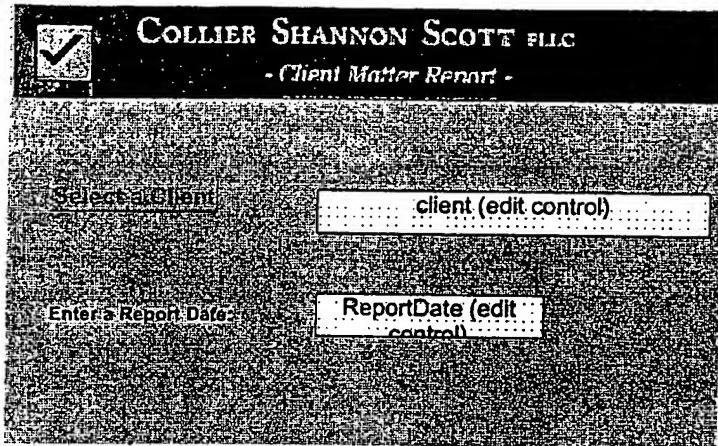
Choose a new Client to associate Matter with

new_client

Choose a new Matter to associate Project with

new_matter

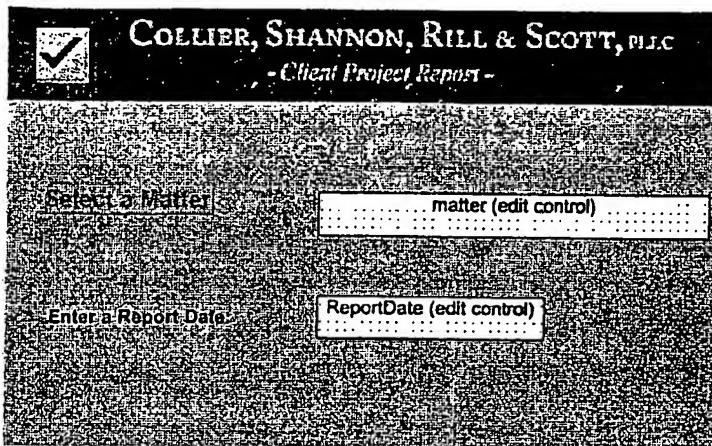
Note: If you selected a client originally, all that Client's
Matters will be associated with the new Client.





COLLIER, SHANNON, RILL & SCOTT, PLLC

- Client Matter Report -



hidden: DocUID

COLLIER, SHANNON, RILL & SCOTT, PLLC

Client Matter Report

Select Responsible Attorney:	resp_atty (combobox)
Enter a Report Date:	ReportDate (edit control)

Hidden Fields: client

hidden Fields : FirstLast | AttorneyStatus

COLLIER SHANNON SCOTT, PLLC

Default Routing Profile

Electronic Routing

New Client Notification:

New Matter Notification:

New Project Notification:

New Event Notification: *Prosecution: Patent**

*Prosecution: Trademark**

Prosecution: Copyright

*Litigation**

Counsel and Advice

Other

New Task Notification: *Prosecution: Patent**

*Prosecution: Trademark**

Prosecution: Copyright

*Litigation**

Counsel and Advice

Other

Docket Manager:

Responsible Attorneys:

Manual Routing

Litigation Routing: *Copy 1*

hidden fields:
REF1

	COLLIER, SHANNON, RILL & SCOTT, PLLC	route_type
ClientNameNum		
MatterNameNum		
Reference:	pros_rout_re	
Date Processed:	Cre_date1	By: route_author1
Routing Information		
<input type="checkbox"/> Copy 1:	Docket:	PRoute_1
<input type="checkbox"/> Copy 2:	Responsible Attorney:	PRoute_2
<input type="checkbox"/> Copy 3:	Routed To:	
PRoute_3		
<input type="checkbox"/> Copy 4:	PRoute_4	

last modified by mjh 3/18/99

hidden fields:

REF1



COLLIER, SHANNON, RILL & SCOTT, PLLC

route_type

ClientNameNum

MatterNameNum

Reference: pros_rout_re

Date Processed: Cre_date1 By: route_author1

Routing Information

Copy 1: Docket: PRoute_1

Copy 2: Responsible Attorney: PRoute_2

Copy 3: Routed To: _____

PRoute_3

Copy 4: PRoute_4

last modified by mjh 3/18/99

hidden fields:

REF1

	COLLIER, SHANNON, RILL & SCOTT, PLC	route_type
ClientNameNum		
MatterNameNum		
Reference:	<input type="text" value="pros_rout_re"/>	
Date Processed:	<input type="text" value="Cre_date1"/>	By: <input type="text" value="route_author1"/>
Routing Information		
Copy 1:	Docket: <input type="text" value="PRoute_1"/>	
Copy 2:	Responsible Attorney: <input type="text" value="PRoute_2"/>	
Copy 3:	Routed To: <input type="text"/>	
	<input type="text" value="PRoute_3"/>	
Copy 4:	<input type="text" value="PRoute_4"/>	

last modified by mjh 3/18/99

hidden fields:

REF1

	COLLIER, SHANNON, RILL & SCOTT, PLLC	route_type
ClientNameNum		
MatterNameNum		
Reference:	<input type="text" value="pros_rout_re"/>	
Date Processed:	<input type="text" value="Cre_date1"/>	By: <input type="text" value="route_author1"/>
Routing Information		
<input type="checkbox"/> Copy 1:	Docket: <input type="text" value="PRoute_1"/>	
<input type="checkbox"/> Copy 2:	Responsible Attorney: <input type="text" value="PRoute_2"/>	
<input type="checkbox"/> Copy 3:	Routed To: <input type="text"/>	
<input type="text" value="PRoute_3"/>		
<input type="checkbox"/> Copy 4:	<input type="text" value="PRoute_4"/>	
<input type="checkbox"/> Copy 5:	<input type="text" value="PRoute_5"/>	

last modified by mjh 3/18/99

hidden fields: Tempfid

	COLLIER SHANNON SCOTT, PLLC COLLIER SHANNON SCOTT	route_type
ClientNameNum		
MatterNameNum		
Reference:	<input type="text" value="lit_route_re"/>	
Document:	<input type="text" value="document"/>	
Routed By:	<input type="text" value="route_author1"/>	On: <input type="text" value="cre_date1"/>
Routing Information		
<input type="checkbox"/> Copy	Responsible Attorney:	<input type="text" value="lit_route1_to"/>
1:		
<input type="checkbox"/> Copy 2:	<input type="text" value="lit_route_to"/>	

last modified by: cvt 9/23/98

status: need feedback on what info is to go into the "lit_route_re" and "document" fields.

hidden fields:

REF1

	COLLIER SHANNON SCOTT, PLLC COLLIER SHANNON SCOTT PLLC	<u>route_type</u>
ClientNameNum		
MatterNameNum		
Reference:	<input type="text" value="pros_rout_re"/>	
Date Processed:	<input type="text" value="Cre_date1"/>	By: <input type="text" value="route_author1"/>
Routing Information		
Copy 1:	Docket: <input type="text" value="PRoute_1"/> RESPONSIBLE ATTORNEY: (Check Docket Entry) Docket Entry OK <input type="checkbox"/> Edit Docket Entry <input type="checkbox"/>	
Patrick J. Coyne _____		
Copy 2:	Responsible Attorney: <input type="text" value="PRoute_2"/>	

last modified by mjh 3/18/99

hidden fields:

REF1

	COLLIER SHANNON SCOTT, PLLC ATTORNEYS AT LAW	route_type
ClientNameNum		
MatterNameNum		
PRoute_2		
Reference:	pros_rout_re	
Date Processed:	Cre_date1	By: route_author1
Routing Information		
<input type="checkbox"/> Copy 1:	Docket:	PRoute_1
JASON FLEISHER Scanned _____ Email _____ Original Forwarded _____		
AMY WALDRON: (Check Docket Entry) Docket Entry OK _____ Edit Docket Entry _____		
Patrick J. Coyne _____		

last modified by mjh 3/18/99

A-51 ✓

hidden fields:

REF1



COLLIER SHANNON SCOTT, PLLC
LIMITED LIABILITY COMPANY

route_type

ClientNameNum

MatterNameNum

PRoute_2

Reference: pros_rout_re

Date Processed: Cre_date1 By: route_author1

Routing Information

Copy 1: Docket: PRoute_1

JASON FLEISHER
Scanned _____ Email _____ Original Forwarded _____

AMY WALDRON: (Check Docket Entry)
Docket Entry OK _____ Edit Docket Entry _____

Patrick J. Coyne _____

[Redacted]
last modified by mjh 3/18/99

A-53 ✓

Select the Responsible Attorney and Work Partner

Attorney (combobox)
Select Work Partner
Attorney (checkbox)

Filing Date	: filing_date (edit control)
Termination Date	: term_date (edit control)
Reason	: why_term (combobox)
Maintenance	: maint (edit control)
Patent Status	

last modified by cvt 8/3/98
status:

Date of First Use	: first_use (edit control)
First Use:	: i_state_use (edit control)
Filing Date	: filing_date (edit control)
Termination	: termination (combobox)
Date	: term_date (edit control)
How?	: how_term (combobox)
Renewal	: renewal (edit control)
Trademark Status	

last modified by cvt 9/21/98

status: o.k.

Select the Responsible Attorney and Work Partner

Select Attorney

Attorney (static text)

Select Work Partner

Secretary (static text)

hidden Fields : Pcontrol_ODBCPassword Tcontrol_ODBCPassword



COLLIER SHANNON SCOTT, PLLC

Data Transfer Configuration

Select which Database to configure: Database

Patent Information

ODBC Data Source

Data Source Name: Pcontrol_ODBCDSN

Data Source ID: Pcontrol_ODBCID

Data Source Table Name: Pcontrol_ODBCTableName

ODBC Key Column: (Notes Map
)* Pcontrol_ODBCKeyColumn

ODBC Key Column: (ODBC
Map)* Pcontrol_ODBCKeyColumnDSN

*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.

Trademark Information

ODBC Data Source

Data Source Name: Tcontrol_ODBCDSN

Data Source ID: Tcontrol_ODBCID

Data Source Table Name: Tcontrol_ODBCTableName

ODBC Key Column: (Notes Map
)* Tcontrol_ODBCKeyColumn

ODBC Key Column: (ODBC
Map)* Tcontrol_ODBCKeyColumnDSN

*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.